HOUSING MARKET INFORMATION

# SENIORS' HOUSING REPORT
## Alberta

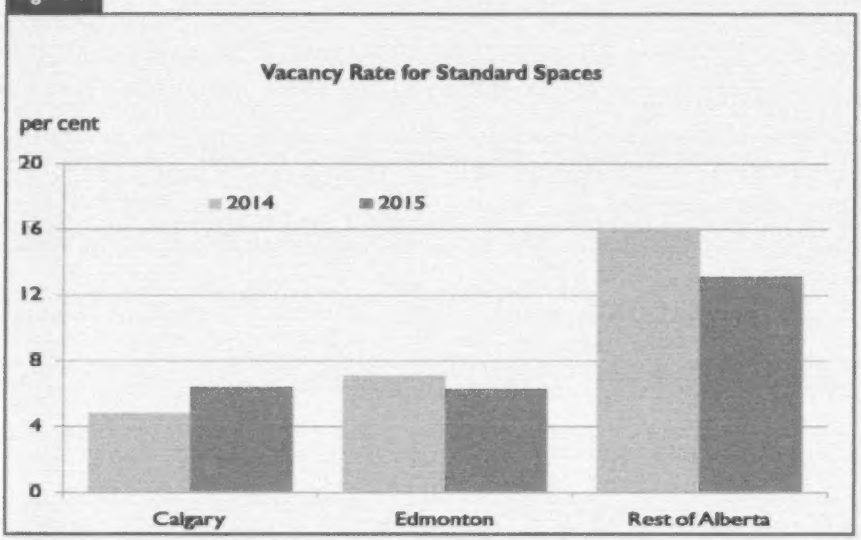
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2015

## Highlights

- The overall vacancy rate for a standard space in retirement homes across Alberta declined to 8.1 per cent in 2015, from 8.5 per cent in 2014.
- The overall average rent in Alberta for a standard space averaged $2,922 per month in 2015 compared to $2,826 in 2014.
- The 2015 survey universe included 11,143 standard and non-standard spaces, spread across 105 residences.

Figure 1




Source: CMHC

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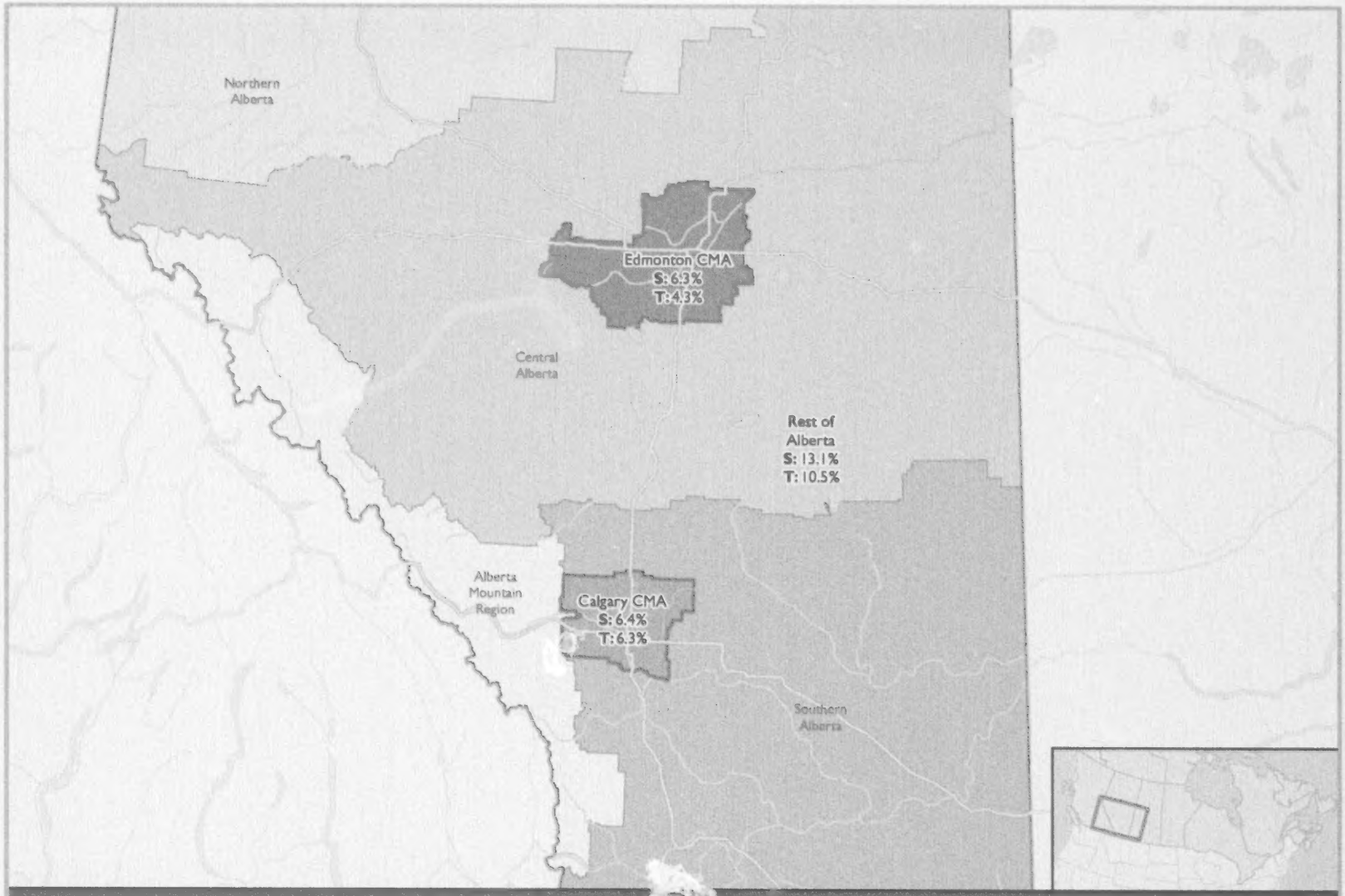



# ALBERTA VACANCY RATE OF STANDARD AND TOTAL (UNIVERSE) SPACES

**Province Total**
**S**: 8.1%
**T**: 6.6%

**S**: Standard Spaces
**T**: Total Spaces (Universe)

Number of Structures
1 - 3 | 19 - 21 | 29 or more
4 - 18 | 22 - 28 | No Data

0 25 50 100 150 km

# Vacancy Rates

## Vacancy rate declines in 2015

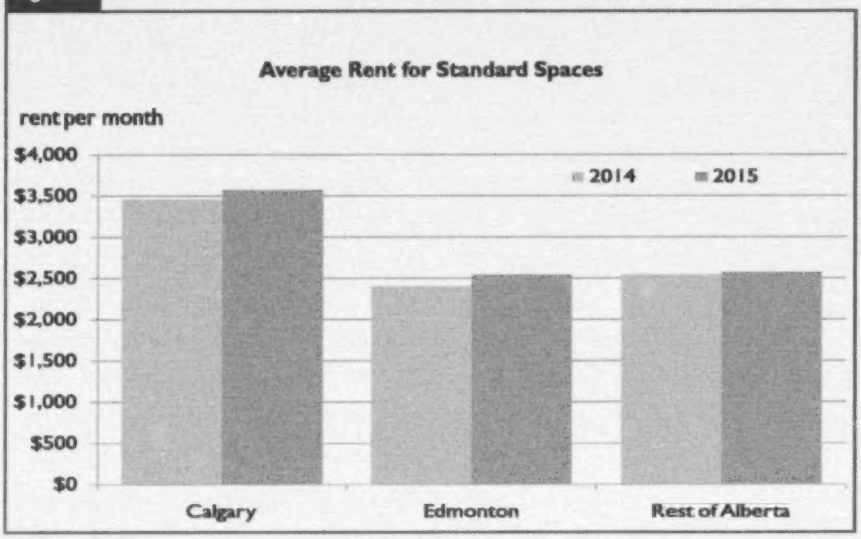
According to CMHC's survey of retirement homes in Alberta, the vacancy rate for standard retirement spaces declined to 8.1 per cent in 2015 from 8.5 per cent in 2014. In the Edmonton Census Metropolitan Area (CMA) the vacancy rate was 6.3 per cent in 2015, down from 7.1 per cent in 2014. The vacancy rate in the Calgary CMA increased, moving from 4.8 per cent to 6.4 per cent. Outside of the province's two largest cities, the vacancy rate declined from 16.1 per cent in 2014 to 13.1 per cent in 2015.

At the provincial level, suites with two or more bedrooms recorded the lowest vacancy rate amongst standard spaces at 4.5 per cent, down from 6.9 per cent in 2014. In Edmonton the vacancy rate for a standard space in suites with two or more bedrooms also declined to 3.1 per cent from five per cent in 2014. In Calgary, the vacancy rate for a standard space in a two-bedroom suite was also the lowest across suite types, despite posting an increase from 1.5 per cent in 2014 to 2.9 per cent in 2015.

Standard spaces in bachelor suites had the highest vacancy rate at the provincial level, at 9.9 per cent. This was also the case for the Edmonton CMA, and for the Rest of Alberta. Calgary was the only exception, where standard spaces in one-bedroom suites posted the highest vacancy rate at 7.1 per cent. This also represented the largest increase in the vacancy rate across suite types for Calgary and was a result of an increase in the supply of one-bedroom units available.

Standard spaces with a rent below $1,500 recorded the lowest vacancy rate in 2015, at 4.3 per cent. Spaces with a rent between $1,500 and $1,900 continued to record the highest vacancy rate and also posted the largest increase in the vacancy rate in 2015. For these spaces the vacancy rate was 19 per cent in 2015, up from 12.6 per cent in 2014. Spaces with the highest rent, at $3,000 or more, had a vacancy rate of 6.6 per cent, relatively unchanged from 6.5 per cent one year prior.

Figure 2

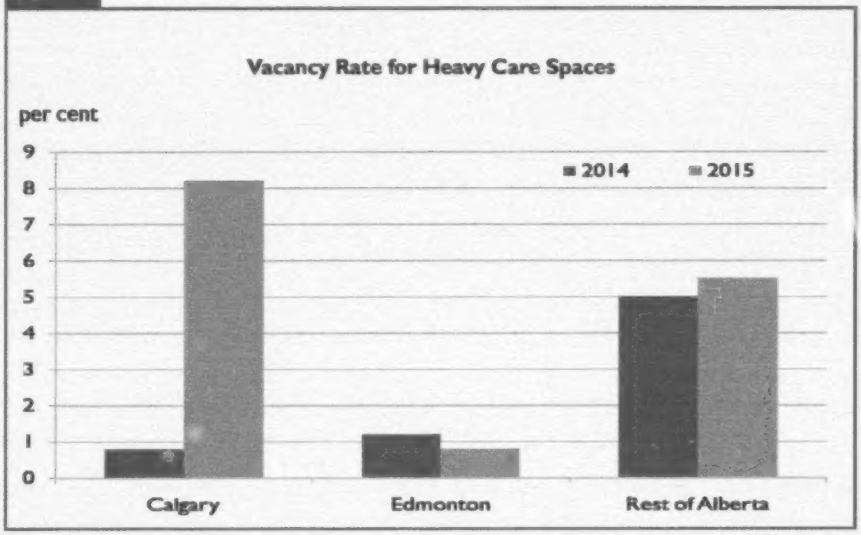



Source: CMHC

## Vacancy rate of heavy care spaces rises

Heavy care spaces are classified as spaces in seniors' residences where the residence provides 1.5 hours or more of health care per day to the resident. After declining to 2.2 per cent in 2014, the vacancy rate for these types of spaces in Alberta increased to 4.2 per cent in 2015. The

Figure 3




Source: CMHC

largest increase in the vacancy rate was in Calgary, where the rate moved from 0.8 per cent in 2014 to 8.2 per cent in 2015. The vacancy rate for heavy care spaces in Edmonton moved down slightly, from 1.2 per cent to 0.8 per cent over the same comparison. In the remainder of the province, heavy care spaces posted a vacancy rate of 5.5 per cent in 2015, compared to five per cent one year prior.

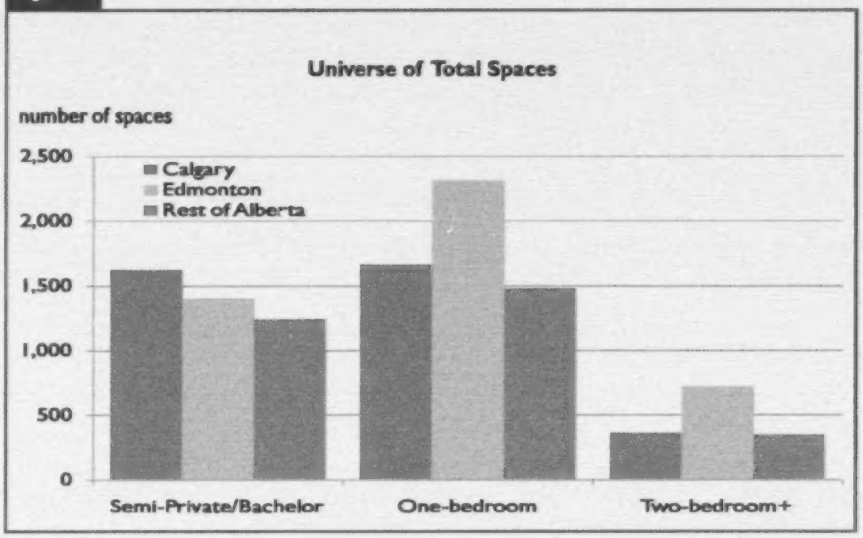
## Universe of Retirement Spaces

CMHC's seniors' housing survey included 11,143 retirement spaces, up six per cent from 2014. The survey included 105 residences and counted 11,307 seniors living in these residences. Although the number of spaces increased at a faster pace than the population of seniors aged 75 and over, the capture rate for the survey increased to 5.5 per cent, up from 5.2 per cent in 2014. This means that a larger proportion of Alberta's seniors chose to live in a retirement home in 2015.

About 40 per cent of all retirement spaces in Alberta were in Edmonton, another 33 per cent were in Calgary, and the remaining 28 per cent were in other centres in the province. All three areas saw the number of retirement spaces increase from 2014 to 2015, with areas outside of the province's two largest cities posting the biggest gain with an 11.2 per cent increase in the number of spaces.

Spaces in one-bedroom units accounted for almost half of all retirement home spaces in Alberta. Semi-private spaces/bachelor units were the second most common, at 38 per cent. Spaces in two-bedroom units accounted for the remaining 13 per cent.

Figure 4

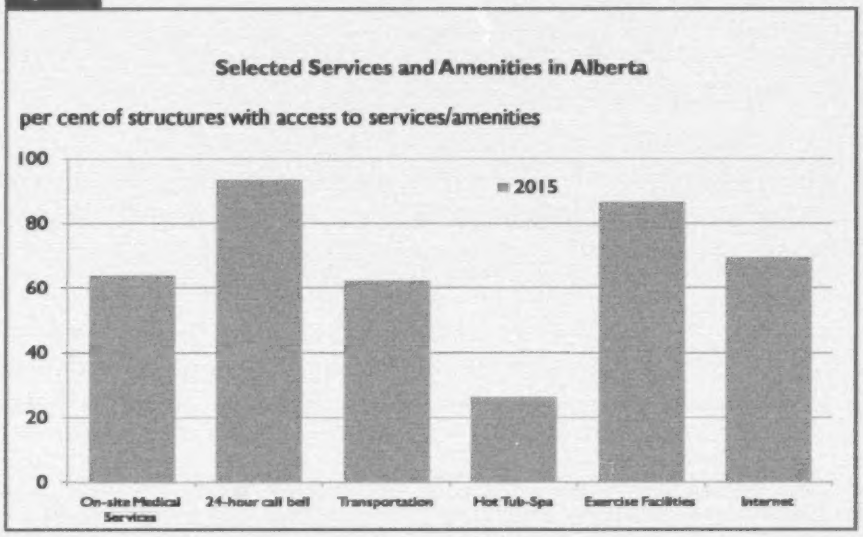



Source: CMHC

## Services and Amenities

There are a number of services and amenities found in seniors' residences that are not typically present in a purpose-built rental building. These services cater to seniors and may include medical services, meal plans, housekeeping and various recreational programs. CMHC's seniors' housing survey only includes those facilities that offer at least an on-site meal plan. The majority of structures surveyed in Alberta, over 64 per cent, had three meals included in the rent. As was the case in the 2014 survey, the most common amenities were a 24-hour call bell service and an exercise facility, found in 93 and 87 per cent of structures surveyed in 2015, respectively, in Alberta.

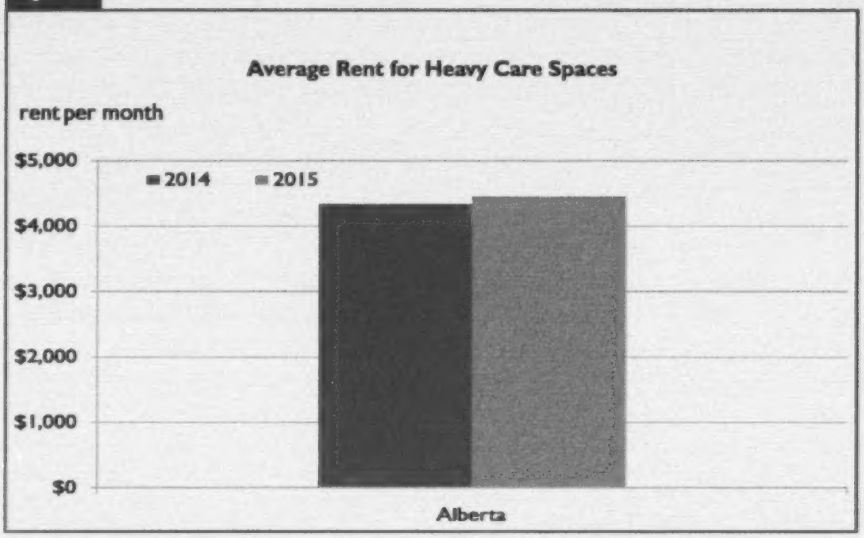
Figure 5




Source: CMHC

Many of the services and amenities were provided in a higher proportion of structures in Calgary compared to Edmonton and the Rest of Alberta. For example, internet access and transportation services were provided in 85 and 93 per cent of structures surveyed, respectively, in Calgary compared to 66 and 57 per cent in Edmonton. For the Rest of Alberta, the proportion of structures with internet access was 62 per cent and transportation service was provided in 46 per cent of structures surveyed. While there were many amenities not equally available across centres, the proportion of structures with on-site medical and nursing services was more comparable. Between Edmonton, Calgary, and the Rest of Alberta, the proportion of structures with on-site medical services ranged from 56 to 69 per cent and nursing services ranged from 48 to 60 per cent.

Figure 6




Source: CMHC

# Rents

## Average rent for standard spaces increases in Alberta

In Alberta, the average rental rate for a standard space was $2,922 in 2015 for all suite types, compared to $2,826 a year earlier. The additional amenities and services provided in seniors' residences typically push rents above those in the purpose-built rental market. At the provincial level, all bedroom type categories witnessed an increase in average rent. Suites with two-bedrooms or more reported an average rent of $3,542 in 2015, up from $3,442 in 2014. The average rent for bachelor and one-bedroom suites also increased from the previous year. From 2014 to 2015, the average rent for bachelor suites rose to $2,405, while one-bedroom suites increased to $2,960.

The overall average rent for a standard space in Calgary was the highest in the province and well above the rents reported in Edmonton and the Rest of Alberta. Calgary had an overall average rent of $3,564 in 2015 while rents in Edmonton and the Rest of Alberta were comparable, averaging $2,538 and $2,564, respectively. Suites with two or more bedrooms in Calgary and Edmonton both recorded an increase in the average rent from 2014 to 2015. Meanwhile, the average rent for suites with two or more bedrooms in the Rest of Alberta declined slightly to $3,334 in 2015 from $3,346 a year earlier. Bachelor and one-bedroom suites in 2015 reported a year-over-year increase in the average rent for all three regions.

In Alberta, the distribution of standard spaces by rent range was skewed toward the higher rent ranges in 2015 due primarily to rents in Calgary. In Calgary, nearly 70 per cent of standard spaces had an average rent of $3,000 or more. By contrast, in both Edmonton and the Rest of Alberta, standard spaces with rents of $3,000 or more comprised less than a quarter of the total standard spaces in those centres. For units in the lowest price range, only five per cent of standard spaces in Alberta had rents for less than $1,500 per month. These suites were mainly in Edmonton, with some in the Rest of Alberta. Calgary, however, had no standard spaces renting below $2,000 per month. More than a third of the standard spaces in Edmonton had an average rent between $2,500 and $2,999 per month. For the Rest of Alberta, 31 per cent of standard spaces rented for $2,000 to $2,499.

## Average Rent for Heavy Care Spaces

Heavy care spaces in Alberta had an average rent of $4,450 in 2015, up from $4,329 in 2014. Rents for heavy care spaces generally command higher rents compared to standard spaces as more health care services are included in the rent. The average rent for a heavy care space in Edmonton was $3,709 in 2015 while Calgary reported an average rent of $5,220.

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## 1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
### Alberta

| Centre | Semi Private | | Bachelor | | One Bedroom | | Two Bedroom + | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| Calgary CMA | ** | ** | 5.8 | 6.5 | 5.0 | 7.1 | 1.5 | 2.9 | 4.8 | 6.4 |
| Edmonton CMA | ** | ** | 11.5 | 12.9 | 6.5 | 5.4 | 5.0 | 3.1 | 7.1 | 6.3 |
| Rest of Alberta | ** | ** | 19.7 | 13.2 | 14.6 | 14.1 | 17.5 | 9.0 | 16.1 | 13.1 |
| **Alberta** | ** | ** | **10.5** | **9.9** | **8.1** | **8.4** | **6.9** | **4.5** | **8.5** | **8.1** |

**The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).**

## 1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
### Alberta

| Centre | Less than $1,500 | | $1,500 - $1999 | | $2,000 - $2,499 | | $2,500 - $2,999 | | $3,000 and more | | Total where rents are known | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| Calgary CMA | ** | ** | ** | ** | 4.5 | 5.9 | 9.8 | 5.1 | 3.8 | 6.8 | 4.8 | 6.4 |
| Edmonton CMA | ** | 3.9 | 8.8 | 6.1 | 6.6 | 12.2 | 7.1 | 4.3 | 7.8 | 5.1 | 7.3 | 6.3 |
| Rest of Alberta | ** | 8.1 | 17.5 | 24.5 | 14.8 | 10.9 | 16.1 | 12.5 | 15.8 | 7.9 | 16.2 | 13.1 |
| **Alberta** | **8.5** | **4.3** | **12.6** | **19.0** | **9.0** | **10.3** | **10.0** | **6.6** | **6.5** | **6.6** | **8.6** | **8.1** |

**The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.**

## 1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
### Alberta

| Centre | Vacancy Rate | | Average Rent | |
|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 |
| Calgary CMA | 0.8 | 8.2 | ** | 5,220 |
| Edmonton CMA | 1.2 | 0.8 | 4,295 | 3,709 |
| Rest of Alberta | 5.0 | 5.5 | ** | ** |
| **Alberta** | **2.2** | **4.2** | **4,329** | **4,450** |

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
### Alberta

| Centre | Total Number of Spaces | Overall Vacancy Rate (%) | | Number of Residences | Number of Residents | Estimated Population Aged 75+[1] | Capture Rate[2] (%) |
|---|---|---|---|---|---|---|---|
| | | 2014 | 2015 | | | | |
| Calgary CMA | 3,645 | 4.1 a | 6.3 a | 28 | 3,732 a | | |
| Edmonton CMA | 4,432 | 5.4 a | 4.3 a | 35 | 4,592 a | | |
| Rest of Alberta | 3,066 | 12.5 a | 10.5 a | 42 | 2,983 a | | |
| **Alberta** | **11,143** | **6.8 a** | **6.6 a** | **105** | **11,307 a** | **206,600** | **5.5** |

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 2.1 Universe of Total Spaces by Unit Type
### Alberta

| Centre | Semi Private/ Bachelor | One Bedroom | Two Bedroom + | Total |
|---|---|---|---|---|
| Calgary CMA | 1,622 | 1,664 | 359 | 3,645 |
| Edmonton CMA | 1,403 | 2,312 | 717 | 4,432 |
| Rest of Alberta | 1,240 | 1,477 | 349 | 3,066 |
| **Total Alberta** | **4,265** | **5,453** | **1,425** | **11,143** |

## 2.2 Universe by Unit Type
### Alberta

| Centre | Semi Private/ Bachelor | One Bedroom | Two Bedroom or more | Total |
|---|---|---|---|---|
| Calgary CMA | 1,622 | 1,664 | 359 | 3,645 |
| Standard Spaces | 877 | 1,529 | 341 | 2,747 |
| Non-Standard Spaces | 702 | 87 | 7 | 796 |
| Unknown Spaces | 43 | 48 | 11 | 102 |
| Edmonton CMA | 1,403 | 2,312 | 717 | 4,432 |
| Standard Spaces | 533 | 1,744 | 643 | 2,920 |
| Non-Standard Spaces | 870 | 568 | 74 | 1,512 |
| Unknown Spaces | - | - | - | - |
| Rest of Alberta | 1,240 | 1,477 | 349 | 3,066 |
| Standard Spaces | 425 | 1,188 | 320 | 1,933 |
| Non-Standard Spaces | 790 | 211 | 13 | 1,014 |
| Unknown Spaces | 25 | 78 | 16 | 119 |
| **Alberta** | **4,265** | **5,453** | **1,425** | **11,143** |
| Standard Spaces | 1,835 | 4,461 | 1,304 | 7,600 |
| Non-Standard Spaces | 2,362 | 866 | 94 | 3,322 |
| Unknown Spaces | 68 | 126 | 27 | 221 |

## 2.3 Universe of Standard Spaces by Rent Range ($)
### Alberta

| Centre | Less than $1,500 | $1,500 - $1,999 | $2,000 - $2,499 | $2,500 - $2,999 | $3,000 and more |
|---|---|---|---|---|---|
| | % of Total[1] | % of Total[1] | % of Total[1] | % of Total[1] | % of Total[1] |
| Calgary CMA | ** | 0.0 | 12.3 | 17.8 | 69.9 |
| Edmonton CMA | 12.8 | 5.8 | 22.1 | 35.9 | 23.4 |
| Rest of Alberta | 1.8 | 19.0 | 30.5 | 24.5 | 24.2 |
| **Alberta** | **5.2** | **7.2** | **20.7** | **26.2** | **40.7** |

[1] % is based on those spaces where the rent is known.

**The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.**

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## 2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
## Alberta

| Centre | Meals | | | | On-Site Medical Services | On-Site Nursing Services[2] | 24-hour call bell | Pharmacy |
|---|---|---|---|---|---|---|---|---|
| | Optional | # included in rent | | | | | | |
| | | 1 | 2 | 3 | | | | |
| Calgary CMA | 0.0 c | 11.1 c | 7.4 c | 81.5 a | 55.6 a | 48.1 a | 96.3 a | 22.2 c |
| 10 - 49 | ** | ** | ** | ** | ** | ** | ** | ** |
| 50 - 89 | ** | ** | ** | ** | ** | ** | ** | ** |
| 90 or more | 0.0 c | 12.5 c | 4.2 c | 83.3 a | 54.2 a | 45.8 a | 95.8 a | 20.8 c |
| Edmonton CMA | 2.9 c | 42.9 b | 14.3 c | 40.0 b | 68.6 a | 60.0 a | 91.4 a | 11.4 c |
| 10 - 49 | ** | ** | ** | ** | ** | ** | ** | ** |
| 50 - 89 | 0.0 c | 50.0 b | 33.3 c | 16.7 c | 50.0 a | 33.3 a | 100.0 a | 16.7 c |
| 90 or more | 3.7 c | 40.7 b | 11.1 c | 44.4 b | 70.4 a | 66.7 a | 88.9 a | 11.1 c |
| Rest of Alberta | 0.0 c | 17.3 c | 10.1 c | 72.6 a | 65.5 a | 51.2 a | 92.9 a | 4.8 c |
| 10 - 49 | ** | 19.5 c | ** | ** | ** | ** | 70.7 a | 9.8 c |
| 50 - 89 | 0.0 c | 16.4 c | 11.0 c | 72.6 a | 78.1 a | 56.2 a | 100.0 a | 5.5 c |
| 90 or more | ** | ** | ** | 83.3 a | 59.3 a | ** | 100.0 a | ** |
| Alberta | 1.0 c | 24.2 b | 10.8 c | 64.1 a | 63.9 a | 53.3 a | 93.3 a | 11.6 c |
| 10 - 49 | 0.0 c | 24.5 b | ** | 57.1 a | 59.2 a | 40.8 a | 75.5 a | 8.2 c |
| 50 - 89 | 0.0 c | 21.9 b | 18.4 c | 59.7 a | 70.6 a | 52.4 a | 100.0 a | 11.1 c |
| 90 or more | 1.5 c | 25.0 b | 6.2 c | 67.3 a | 61.9 a | 56.1 a | 93.8 a | 12.5 c |

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

## 2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
## Alberta

| Centre | Transport-ation Services | Swimming Pool | Hot Tub - Spa | Movie Theatre | Exercise Facilities | Internet |
|---|---|---|---|---|---|---|
| Calgary CMA | 92.6 a | 14.8 c | 44.4 a | 66.7 a | 96.3 a | 85.2 a |
| 10 - 49 | ** | ** | ** | ** | ** | ** |
| 50 - 89 | ** | ** | ** | ** | ** | ** |
| 90 or more | 95.8 a | 16.7 c | 50.0 a | 66.7 a | 100.0 a | 91.7 a |
| Edmonton CMA | 57.1 a | 2.9 c | 17.1 c | 28.6 c | 82.9 a | 65.7 a |
| 10 - 49 | ** | ** | ** | ** | ** | ** |
| 50 - 89 | 16.7 c | 16.7 c | 16.7 c | 0.0 - | 83.3 a | 16.7 c |
| 90 or more | 70.4 a | 0.0 - | 18.5 c | 37.0 b | 85.2 a | 77.8 a |
| Rest of Alberta | 46.4 a | 2.4 c | 22.0 c | 41.7 a | 83.3 a | 61.9 a |
| 10 - 49 | 29.3 c | ** | ** | 9.8 c | ** | 80.5 a |
| 50 - 89 | 38.4 a | 0.0 - | 16.4 c | 50.7 a | 94.5 a | 39.7 a |
| 90 or more | 70.4 a | 7.4 c | ** | ** | 100.0 a | 77.8 a |
| Alberta | 62.3 a | 5.9 c | 26.4 a | 44.0 a | 86.6 a | 69.4 a |
| 10 - 49 | 24.5 c | 0.0 - | 0.0 - | 8.2 c | ** | 75.5 a |
| 50 - 89 | 36.8 a | 3.7 c | 14.6 c | 41.4 a | 88.9 a | 33.9 a |
| 90 or more | 80.1 a | 7.9 c | 36.2 a | 51.8 a | 93.9 a | 83.1 a |

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 3.1 Average Rent ($) of Standard Spaces by Unit Type
### Alberta

| Centre | Semi Private | | Bachelor | | One Bedroom | | Two Bedroom + | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| Calgary CMA | ** | ** | 2,789 | 2,860 | 3,625 | 3,754 | 4,466 | 4,522 | 3,460 | 3,564 |
| Edmonton CMA | ** | ** | 1,855 | 1,974 | 2,408 | 2,515 | 2,910 | 3,092 | 2,402 | 2,538 |
| Rest of Alberta | ** | ** | 1,905 | 1,990 | 2,546 | 2,562 | 3,346 | 3,334 | 2,544 | 2,564 |
| **Alberta** | ** | ** | 2,315 | 2,405 | 2,866 | 2,960 | 3,442 | 3,542 | 2,826 | 2,922 |

**The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).**

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** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## O1 Building Structure Makeup (%)
### Alberta

| Centre | Concrete Frame | Wood Frame |
|---|---|---|
| Calgary CMA | 35.7 | 64.3 |
| Edmonton CMA | 57.1 | 42.9 |
| Rest of Alberta | 21.4 | 78.6 |
| **Alberta** | **37.1** | **62.9** |

## O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
### Alberta

| Centre | Services | Included in Rent (%) | Tenant Arrange (%) | Optional (%) | Average Cost if Optional ($) |
|---|---|---|---|---|---|
| Calgary CMA | Cable | 46.4 | 35.7 | 17.9 | ** |
| | Telephone | 10.7 | 60.7 | 21.4 | ** |
| Edmonton CMA | Cable | 57.1 | 34.3 | 8.6 | ** |
| | Telephone | 2.9 | 74.3 | 14.3 | ** |
| Rest of Alberta | Cable | 42.9 | 31.0 | 23.8 | 36.25 |
| | Telephone | 9.5 | 59.5 | 16.7 | 31.86 |
| **Alberta** | **Cable** | **48.6** | **33.3** | **17.1** | **41.54** |
| | **Telephone** | **7.6** | **64.8** | **17.1** | **32.75** |

## O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
### Alberta

| Centre | Before 1990 | 1990 - 1999 | 2000 or later | Total |
|---|---|---|---|---|
| Calgary CMA | ** | 5.3 a | 7.0 a | 6.4 a |
| Edmonton CMA | 5.5 a | 6.5 a | 6.5 a | 6.3 a |
| Rest of Alberta | ** | 8.6 a | 13.9 a | 13.1 a |
| **Alberta** | **5.2 a** | **6.5 a** | **9.0 a** | **8.1 a** |

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
**: Suppressed for confidentiality/statistical reliability -: A zero count or no Universe

## O4 Average Rents ($) of Standard Spaces by Date Residence Opened
## Alberta

| Centre | | Before 1990 | 1990 - 1999 | 2000 or later | Total |
|---|---|---|---|---|---|
| Calgary CMA | Semi Private | ** | ** | ** | ** |
| | Bachelor | ** | 3,125 a | 2,809 a | 2,860 a |
| | One Bedroom | ** | 3,741 a | 3,715 a | 3,754 a |
| | Two Bedroom + | ** | ** | 4,346 a | 4,522 a |
| | All | ** | 3,611 a | 3,569 a | 3,564 a |
| Edmonton CMA | Semi Private | ** | ** | ** | ** |
| | Bachelor | ** | ** | 1,956 a | 1,974 a |
| | One Bedroom | 1,924 a | 2,770 a | 2,646 a | 2,515 a |
| | Two Bedroom + | ** | ** | 3,126 a | 3,092 a |
| | All | 1,869 a | 2,755 a | 2,727 a | 2,538 a |
| Rest of Alberta | Semi Private | ** | ** | ** | ** |
| | Bachelor | ** | 2,141 a | 1,915 a | 1,990 a |
| | One Bedroom | ** | ** | 2,524 a | 2,562 a |
| | Two Bedroom + | ** | ** | 3,309 a | 3,334 a |
| | All | ** | 2,557 a | 2,565 a | 2,564 a |
| **Alberta** | **Semi Private** | ** | ** | ** | ** |
| | **Bachelor** | **2,207 a** | **2,608 a** | **2,401 a** | **2,405 a** |
| | **One Bedroom** | **2,496 a** | **3,140 a** | **2,988 a** | **2,960 a** |
| | **Two Bedroom +** | ** | **3,994 a** | **3,490 a** | **3,542 a** |
| | **All** | **2,438 a** | **3,027 a** | **2,986 a** | **2,922 a** |

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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## Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

## Definitions

**Space:** A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

**Standard space:** A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

**Heavy care space:** A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

**Respite space:** A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

**Non-market or subsidy space:** A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

**Rent:** The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

**Vacancy:** A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

**Capture rate:** The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

**Acknowledgement**
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

**Confidentiality**
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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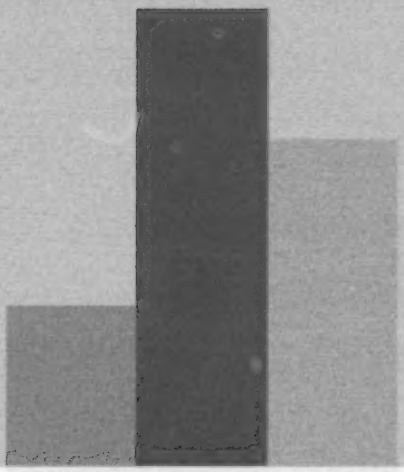

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